



Tips for Virtual CRCG Meetings

Identify a Virtual Meeting Platform

It is important for CRCGs to safeguard the information that is shared in staffings. For virtual meetings, this means using a non-public facing, Health Insurance Portability and Accountability Act (HIPAA)-compliant video communication product. Typically, CRCGs utilize platform accounts shared by partner agencies. For example, the leader may be an employee of the local mental health authority and request to use their secure platform for virtual meetings. If this option is not available, please contact the State CRCG Office for a list of HIPAA-compliant platforms.

*Some restrictions may be lifted during COVID-19. Please visit the U.S. Department of Health and Human Services [website](#) to learn more.

Determine the Meeting Structure

Host a planning meeting with members to determine the structure of the virtual meetings. Plan processes such as check-in procedures, how to streamline introductions, who will talk to the individual or family, how members will communicate with each other, and how recommendations will be made. Best practices include:

- Open the virtual meeting early to let attendees check in.
- Limit staffing attendance to members who can contribute services specific to the individual or family and their needs.
- Have the meeting facilitator list attendees and their role during each staffing instead of individual introductions.
- To avoid confusion, only allow the meeting facilitator to speak with the individual or family and ask members to only use the chat during staffings.
- Have members use their webcams in the presence of the individual or family.
- Minimize disruptive functions, such as entry and exit chimes, and mute background noise, etc.

Member collaboration is necessary for virtual meetings. Ask members to help run the meeting and assign tasks such as facilitating the meeting, maintaining sign in and meeting room privacy, monitoring the chat, and recording service plan recommendations, etc.

Prepare for the Meeting

- Create a meeting tip sheet that provides instructions for members prior to the meeting. This may include best practices for virtual meetings such as how to access the meeting and reminders to mute their lines when not speaking, etc.
- Provide contact information for whom members should reach out to if they encounter technical difficulties.
- Host a practice meeting with members prior to the meeting date to test out the virtual platform.
- Ensure you have all necessary consent forms from members and the individuals and families who will attend.



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Support the Individual or Family

- Ensure that the individual or family will have access to the proper technology required to attend their staffing, including internet, computer, laptop, or smartphone. If possible, provide an option to call in.
- It is critical that the individuals and families who will be in attendance are prepared for the meeting. This is important for in-person meetings, but especially important for virtual meetings because many people may not be familiar or comfortable with virtual platforms. Prior to the staffing, meet with the individual or family and:
 - Discuss what virtual platform will be used and what the experience will be like. Provide them with step by step instructions to help them navigate the platform and outline the communication features they can use.
 - Provide a phone number for them to call if they experience any technical difficulties.
 - Review the agencies and organizations that will be in attendance. If the individual or family is not comfortable with a specific person or organization, adjust the attendance accordingly.
 - Create a plan to let the individual or family's supports join the meeting. CRCG meetings can be overwhelming and having a support person join them can help.
 - Ask if they have a private place or room they can use when attending the meeting. If not, recommend using headphones.
- Use the "Information for Your CRCG Meeting" form and modify as needed to help prepare the individual or family. The form is located on the [CRCG website](#).
- During the staffing, if the individual or family participates by video, pay attention to their non-verbal cues.
- After the staffing, send a copy of the Individual Service Plan to the individual or family and schedule a follow-up meeting to review the recommendations and answer additional questions.

Safeguard Privacy

- Check with your privacy department to ensure that your CRCG has the proper procedures in place for obtaining consent and release of information. Confirm that your CRCG is properly and securely sharing protected health information (PHI) with members who will be attending and ensure the proper digital disposal of PHI.
- To maintain security, have a password to join the room to help prevent unauthorized individuals from joining.
- Ask all attendees to have their name in their profile. Additionally, have attendees sign in on the chat or identify themselves if they joined by phone.
- Remind members of confidentiality when using the chat function, especially when multiple staffings are scheduled in one meeting since the chat log is accessible throughout the whole meeting.
- Utilize the virtual platform's special features, such as a waiting room, to prevent the next scheduled staffing from joining the current session.